



5 Steps to Successfully Submitting the AFI PPR

Hello, let's look at the five steps for successfully submitting the AFI PPR.

For both the short and long forms, after you finish entering your data, you will need to Save, Validate, Certify, e-sign, and Submit. Each of those steps is a button in OLDC and must be completed in this order. The certify and submit buttons will not appear until you have completed the earlier steps. Reports are not actually submitted until you click the submit button and see a status of either 'Submitted' or 'Submitted with Warnings.'

Make sure that you are truly finished with your AFI PPR before you complete these steps and submit your report. Once submitted, you cannot edit a report unless AFI staff un-submit it for you.

Here we are on Section C of an AFI PPR Long Form. Let's pretend you just finished entering all your data and are ready to submit. First, click the Save button – a habit you should already be in as you work on your AFI PPR.

Above the Save and navigation buttons you will see the Report Progress bar that shows both the steps you've completed and the steps you still need to do.

To move on to the Validate step, go to the Report Sections screen by clicking 'Go to Report Sections' from the dropdown at the top of your screen.

On the Report Sections screen, click on the Validate button to run a validation check of the full report. This is different than the Validate buttons on the section screens, which only validate each specific section.

Validating from the Report Sections screen will update the Section Status column on the right. If there are any errors, OLDC will not let you submit the report. You must go back to the section of the AFI PPR with the error, read the error listed, and address it.

If there are any warnings, you should also go back to the section with a warning and confirm that you entered accurate data. OLDC will allow you to submit a report with warnings. We recommend that you explain any warnings that remain on your AFI PPR in an optional narrative that you upload on the Cover Page. Doing this will help the AFI staff that review your AFI PPR understand your data, and hopefully will reduce the need for your AFI PPR to be un-submitted by AFI staff and sent back to you for corrections or explanations. Common reasons a report is un-submitted and returned for edits include: decreases in cumulative data from a prior report; data that does not align with other data provided, such as reporting no IDA holder deposits, but also reporting that IDA holders made asset purchases; and not providing explanations for system warnings.

After you correct any errors and explain any warnings, you will need to Validate the report again. If there are no errors found when you validate from the Report Sections screens, a Certify button will appear.

Click on the Certify button and click okay to any additional messages that pop up.

Doing so will bring you to the Cover Page. Scroll to the bottom to field 11b 'Signature of Authorized Certifying Official' and click on the 'Click to Sign' button. After doing so, it now shows the 'e-sign' icon as a confirmation you completed this step.

After you certify and e-sign, OLDC will allow you to submit your report. To do so, you need to go back to the Report Sections screen, by clicking 'Go to Report Sections' from the dropdown at the top of the screen.

Click on the Submit or Submit with Warnings button and click okay to any additional messages that pop up.

OLDC will bring up the Report Form Status Page and you'll see that it has a status of either Submitted or Submitted with Warnings.

We strongly recommend your final step should be selecting Print as PDF and clicking the Go button to save a copy for your organization's records. You may find it to be a helpful reference for future reports or as a quick reference that you can access without logging in to OLDC.

To recap, after you finish entering your data, you will need to Save, Validate, Certify, e-sign, and Submit – each of which are separate steps, which must be done in that order. Reports are not actually submitted until you click the submit button and see a status of either 'Submitted' or 'Submitted with Warnings.'

If you have any questions about submitting the AFI PPR, please contact the AFI Resource Center Help Desk. The email address is info@idaresources.org and the phone number is 1-866-778-6037.

Thank you and have a great day!